

# ePM Quick Reference Guide #001

## Intro to ePM

### WHAT IS...

ePM is a web-based application. With appropriate security permissions, ePM can be accessed from any computer with connection to the internet. ePM features customized screens and tools to make navigating to information quick and easy. The ePM user interface is tailored to match the licensing and security requirements. This tailoring is reflected in the way menus, buttons and cross-references are displayed.

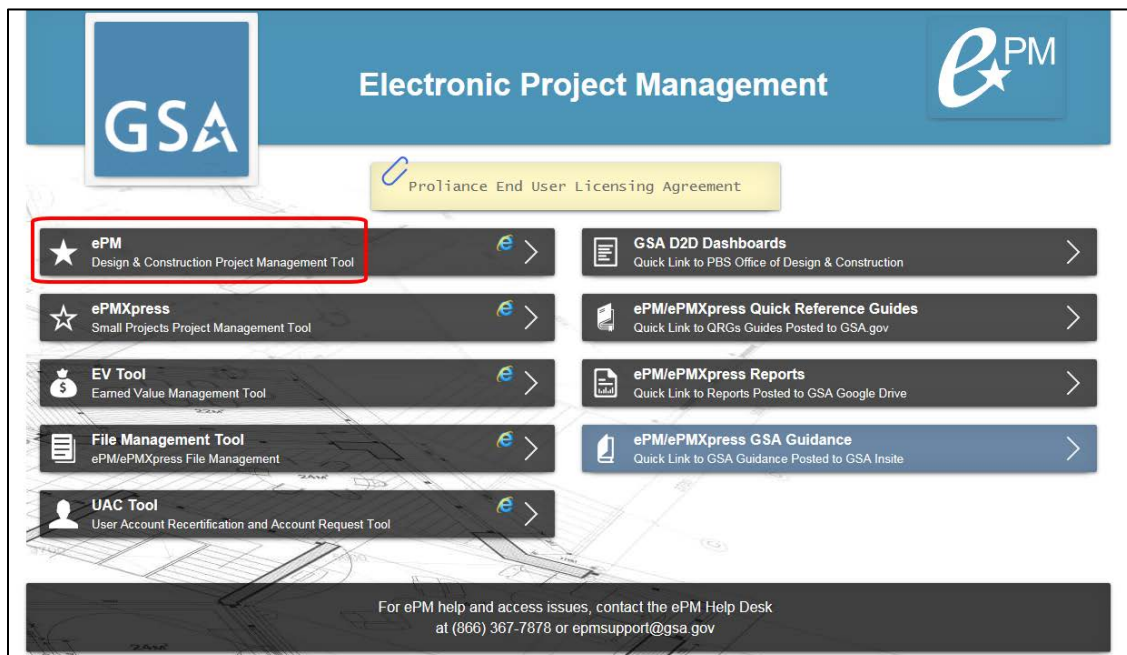
### WHO USES...

- GSA Executive
- Construction Manager
- Project Manager & Staff
- Contracting Officer & Staff
- Architect/Engineer & Staff
- General Contractor
- Customers

### HOW TO...

#### A. LOG INTO EPM FROM INSIDE THE GSA NETWORK (INCLUDING VPN)

1. Using Internet Explorer 9 or higher, go to the [ePM Portal](#).
2. Click on ePM.



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### B. LOG INTO EPM FROM OUTSIDE THE GSA NETWORK

1. Using Internet Explorer 9 or higher, go to the [ePM Portal](#).
2. Click on ePM.
3. Enter your GSA User ID (Example Format: firstmlast).

A screenshot of the "2-Factor to PBS ePM Application" login page. The page has a dark blue header with the GSA logo. Below the header, the title "2-Factor to PBS ePM Application" is displayed. The main content area is white and contains the following elements: a prompt "Please enter your UserID below.", a label "ENT Domain User ID" followed by a text input field containing "firstmlast", a "Submit" button, and links for "Forgot Password" and "Restart Login". A "Powered by SECUREAUTH" logo is in the bottom right corner. Red rectangular boxes highlight the "Submit" button and the user ID input field.

4. Click Submit.
5. Select the delivery method for your temporary registration code.

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GSA

### 2-Factor to PBS ePM Application

Please choose the delivery method for your Registration Code.

The preferred method of delivery for GSA is EMAIL.  
Voice and SMS/TEXT incur additional costs for GSA.

☒ Email xxxxx@gsa.gov

☐ Voice : xxx-xxx-2592 ☒ Voice

☐ Phone/Mobile xxx-xxx-2592 ☐ Voice ☒ SMS/Text

[Forgot Password](#)  
[Restart Login](#)

Powered by SECUREAUTH

6. Click 'Submit'.
7. Enter the four digit registration code provided.

GSA

### 2-Factor to PBS ePM Application

Enter the code that you just received by text.

Registration Code:

8873

1 2 3  
4 5 6  
7 8 9  
0 C

Please click here to use an alternate registration method.

[Forgot Password](#)  
[Restart Login](#)

Powered by SECUREAUTH

8. Click 'Submit'.

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9. Enter your Active Directory password.

Please enter the password associated with your User ID.

ENT Domain User ID: ValerieMPierre

Password: [masked]

Submit

[Forgot Password](#)  
[Restart Login](#)

Powered by SECUREAUTH

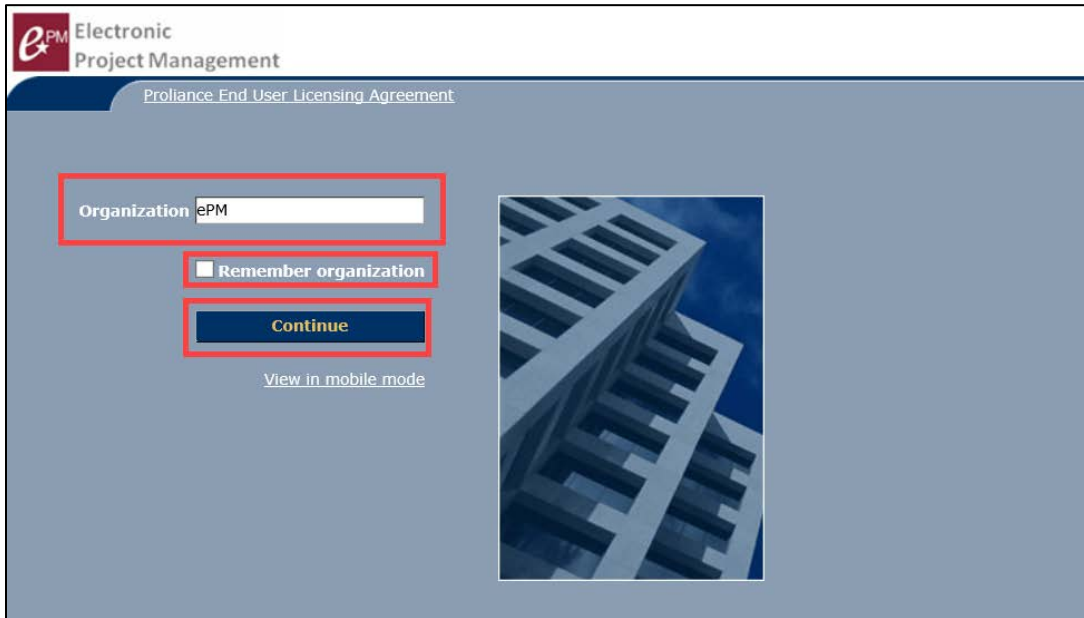
10. Click Submit.

### C. LOG BACK IN AFTER A TIMED OUT SESSION

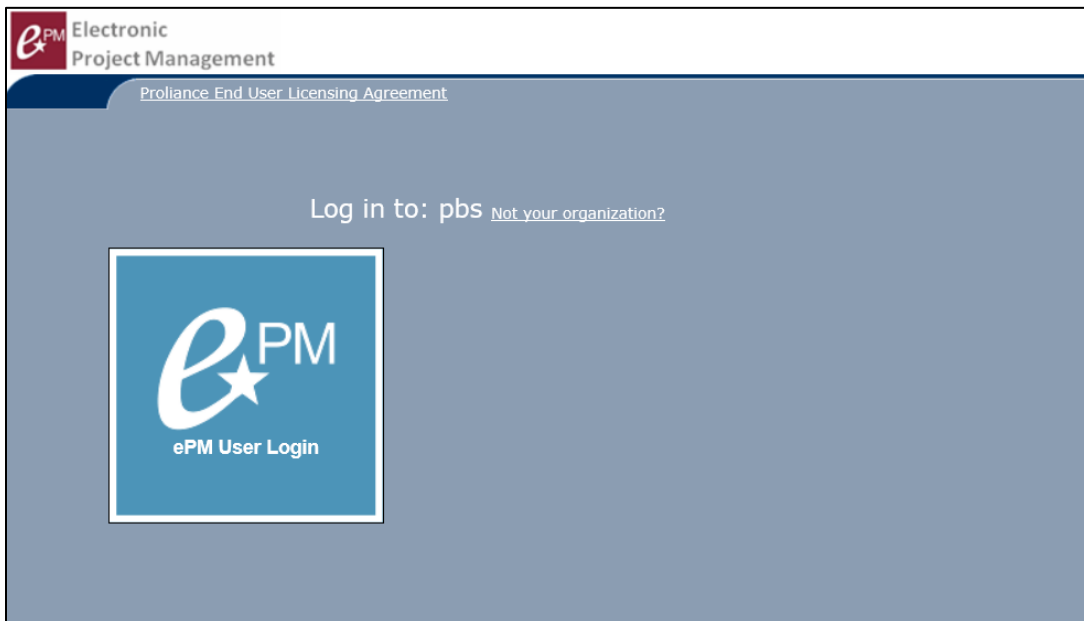
1. If prompted for an "Organization" perform steps a-c, otherwise go to step 2.
  - a. Enter "pbs" in the Organization field.
  - b. Check the "Remember Organization" box.
  - c. Click Continue.
2. Click anywhere inside the large ePM logo.
3. If outside of the GSA network complete steps B3 – B10 above.

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The screenshot shows the ePM login interface. At the top left is the ePM logo and the text "Electronic Project Management". Below this is a link for the "Prolance End User Licensing Agreement". The main form area has a red box around the "Organization" field, which contains the text "ePM". Below the field is a checkbox labeled "Remember organization" and a "Continue" button. A "View in mobile mode" link is at the bottom left. On the right side of the form is a photograph of a modern building.



The screenshot shows the ePM login interface after the organization has been selected. At the top left is the ePM logo and the text "Electronic Project Management". Below this is a link for the "Prolance End User Licensing Agreement". The main form area has the text "Log in to: pbs" followed by a link "Not your organization?". Below this is a large blue button with the ePM logo and the text "ePM User Login".

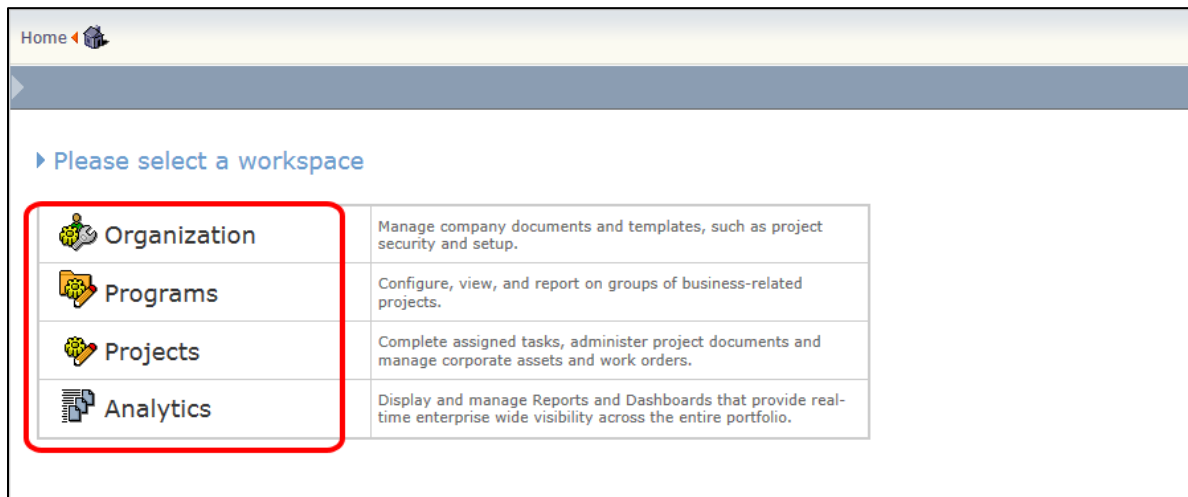
### D. NAVIGATE WORKSPACES

1. Based on a user's functional role in ePM the following workspaces could be available. Most users will only see the Project Workspace.
  - a. Organization: Accessed by Administrators to manage users and project setup.
  - b. Programs: Organized by region and program (Capital and Small). Accessible by Administrators, Regional Executives, and Central Office Oversight.
  - c. Projects: Provides users with a list of all projects that they have been granted access to.

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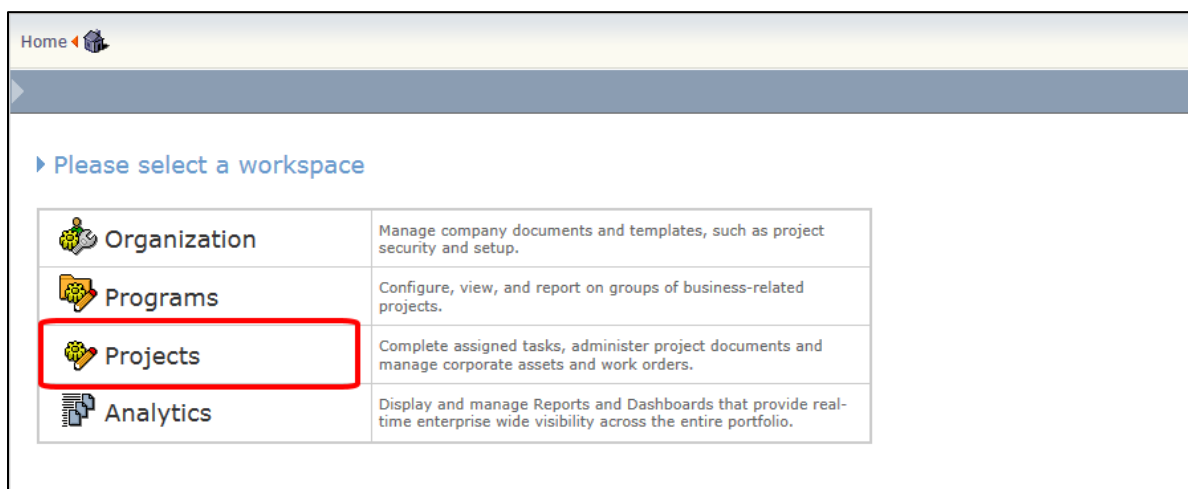
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- d. Analytics: ePM reporting, see QRGs #070 - #085 for more information.
2. Click on the name of the workspace to enter that workspace.



### E. ENTER A PROJECT WORKSPACE

1. From the Home screen, click on Projects.



2. Find the appropriate project using the following methods.
  - a. Scroll up or down the list using the scroll wheel on your mouse or the scroll bar on the right side of the browser window.
  - b. Page forward or backward using the arrows in the upper right of the screen.
  - c. Change the view of the register. See [QRG 003: Register Views](#) for more information.
  - d. Enter a value in the search box in the upper right and click Find.
3. Once the project has been located, click "Enter Project" in the row of that project.

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Project Document	Project Workspace	Number	Program	Project Name	Current State
<a href="#">Open document</a>	<a href="#">Enter Project</a>	1002	Region 03 - Mid-Atlantic Region Capital Project Program	VA-Roanoke-Poff Federal Building-R&A	Completed
<a href="#">Open document</a>	<a href="#">Enter Project</a>	1021	Region 02 - Northeast and Caribbean Region Capital Project Program	NY-Alexandria Bay-Land Port of Entry	Execution
<a href="#">Open document</a>	<a href="#">Enter Project</a>	1026	Region 09 - Pacific Rim Region Small Project Program	NV-Las Vegas-Foley FB- Energy Efficient Design	Completed
<a href="#">Open document</a>	<a href="#">Enter Project</a>	1073	Region 03 - Mid-Atlantic Region Capital Project Program	MD-Urbana-SSA NSC-New Construction	Completed
<a href="#">Open document</a>	<a href="#">Enter Project</a>	1099	Region 01 - New England Region Capital Project Program	MA-Boston-JFK FB-R&A Window Replacement	Completed
<a href="#">Open document</a>	<a href="#">Enter Project</a>	11708	Region 05 - Great Lakes Region Small Project Program	MI-DETROIT-P V MCNAMARA F B-Conference Center, On-Hold	
<a href="#">Open document</a>	<a href="#">Enter Project</a>	1203	Region 11 - National Capital Region Capital Project Program	DC-Washington-FOB 8 FB-R&A	Completed
<a href="#">Open document</a>	<a href="#">Enter Project</a>	1204	Region 03 - Mid-Atlantic Region Capital Project Program	WV-Huntington Federal Building-R&A	Completed
<a href="#">Open document</a>	<a href="#">Enter Project</a>	1205	Region 07 - Greater Southwest Region Capital Project Program	TX-San Antonio-Hipolito Garcia Federal OO/CT R&A	Completed
<a href="#">Open document</a>	<a href="#">Enter Project</a>	12992	Region 11 - National Capital Region Capital Project Program	DC-Washington-St. E's DHS Consolidation-New Pump	Completed
<a href="#">Open document</a>	<a href="#">Enter Project</a>	13125	Region 02 - Northeast and Caribbean Region Capital Project Program	NY-Manhattan-Javits FB-FBI 22nd Floor Office Renov	Completed
<a href="#">Open document</a>	<a href="#">Enter Project</a>	13160	Region 10 - Northwest / Arctic Region Capital Project Program	WA-Seattle-New Courthouse-Seattle Courthouse Fire	Completed
<a href="#">Open document</a>	<a href="#">Enter Project</a>	14344	Region 11 - National Capital Region Capital Project Program	DC-Washington-Harry S Truman Modernization Phas	Execution
<a href="#">Open document</a>	<a href="#">Enter Project</a>	14907	Region 10 - Northwest / Arctic Region Small Project Program	WA-Spokane-FB/PO-Design Services to Improve HVI Planning	
<a href="#">Open document</a>	<a href="#">Enter Project</a>	14992	Central Office Soft Projects Program	ePM Evaluation	Cancelled
<a href="#">Open document</a>	<a href="#">Enter Project</a>	1500	Region 03 - Mid-Atlantic Region Capital Project Program	PA-Philadelphia-US Customhouse-Renovations	Completed
<a href="#">Open document</a>	<a href="#">Enter Project</a>	1521	Region 09 - Pacific Rim Region Capital Project Program	AZ-Nogales-BS Office Bldg-Nogales West U.S. Land	Completed

### F. NAVIGATE IN A PROJECT WORKSPACE

1. The project workspace is broken up into three areas.
  - a. Header
    1. Navigation Trail: Allows user to back up to the project list of home screen.
    2. Go To Program Button: If user's security allows, changes the view from the project workspace to the program workspace.
    3. My Preferences Button: Allows user to set the following personal preferences.
      - a. General
        - i. Default page to open after login: "Workspace Navigator" is recommended.
        - ii. Number of Items displayed in register: For better performance it is recommended that this number be set lower.
        - iii. Enable screen reader enhancements: Check this box if using assistive technologies such as text-to-speech audio interfaces.
        - iv. Enable ACR stationary header: Freezes the header in the ACR.
      - b. Product Language: English is the only supported language in ePM.
      - c. Content Formatting
        - i. Format Locale: Leave set to English (United States)
        - ii. Preferred Calendar: Gregorian
        - iii. Date Entry: Choose preferred format.
        - iv. Date Display: Choose preferred format.
        - v. Time: Choose preferred format.
    4. Help Button: Contains generic help for the Commercial "Off The Shelf" (COTS) product that is the platform for ePM. Use the ePM QRGs for help.
    5. Log Off Button: Logs the user out of ePM
  - b. Menu: Contains a list of the applications available to the user.
  - c. Register: Once an application in the menu is selected, this area of the screen provides a list or register view of all the documents the user has access to.

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Home Projects JN PIP and RAHD Project

Logged On: Valerie Pierre (PBS)

**Project Home**

Workspace and Sub-Project Info

Project Properties

Notices

Notices Summary

My Notices

Project Notices

PM Tools

Project Manager Quick Links

Project Management

Schedules

Financial Management

Contract Management

Portfolio Planning

Design Management

Construction Management

Reports (GSA Internal Only)

Support Resources

File Manager

File Management

Reports

Address Book

Administration

**JN PIP and RAHD Project**

Brief Description field: Tenant funded (RWA) renovation at Building 85, DFC, and includes

**Notices By Priority**

	Mine	Project
Urgent	0	1
High	0	0
Normal	1	968
Low	0	0

**Notices By Date**

	Mine	Project
Overdue	0	953
Due Today	0	0
Due Next 7 Days	0	0
Due Beyond 7 Days	0	0

**Notices By Type**

	Mine	Project
Review	1	16
Process	0	7
FYI	0	946
Error	0	0

### G. WORK WITH NOTICES

1. In the Project Workspace menu, navigate to Notices > My Notices > Received.
2. Find the appropriate notice using the following methods.
  - a. Scroll up or down the list using the scroll wheel on your mouse or the scroll bar on the right side of the browser window.
  - b. Page forward or backward using the arrows in the upper right of the screen.
  - c. Change the view of the register. See QRG #003 for more information.
  - d. Enter a value in the search box in the upper right and click Find.
3. Once the notice has been located, click anywhere in the row to open the document that triggered the notice. The details of the notice will appear on the right of the document.
 

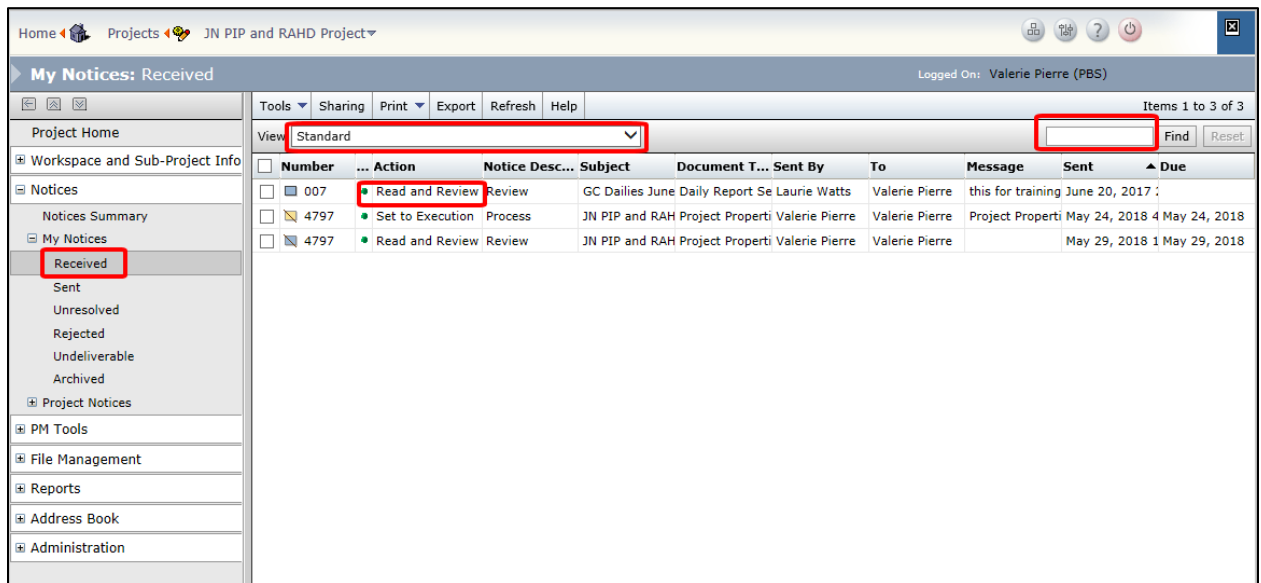
TIP: The icon to the left of the number in the notices register represents the following.

  - Yellow: You are expected to collaborate on the document.
  - Blue: Document is for review, contribute if needed.
  - White: FYI, you are not expected to perform any action.



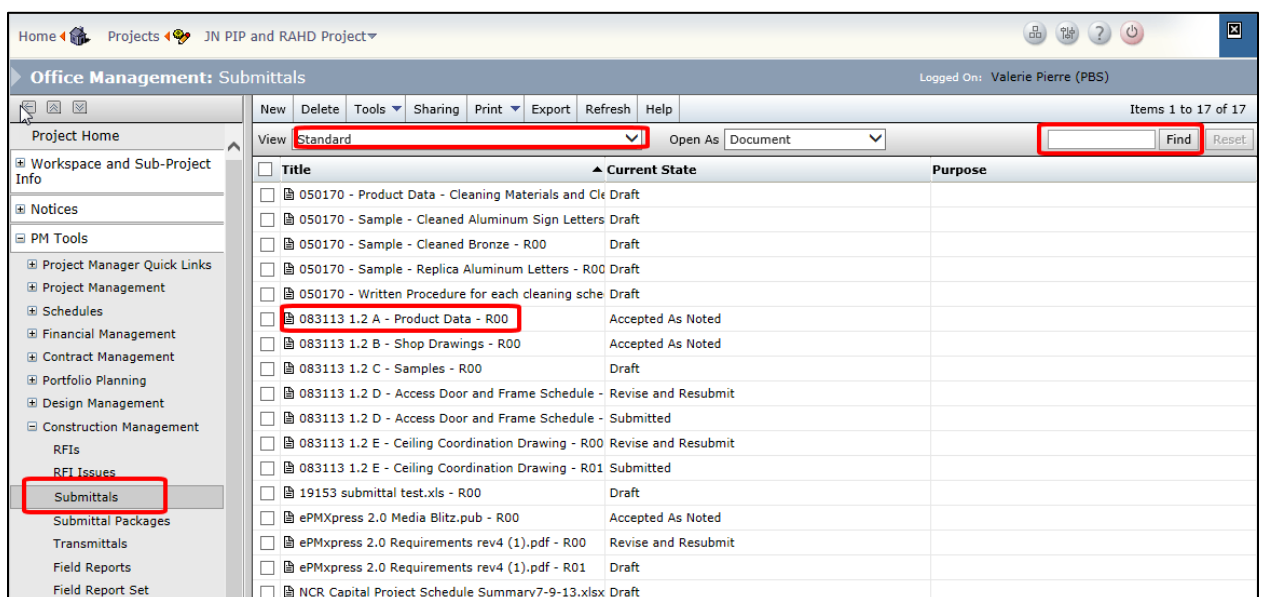
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### H. OPEN AN EXISTING DOCUMENT

1. Click on the menu option for the type of document you are looking for. (i.e. Submittals)
2. Find the appropriate document using the following methods.
  - a. Scroll up or down the list using the scroll wheel on your mouse or the scroll bar on the right side of the browser window.
  - b. Page forward or backward using the arrows in the upper right of the screen.
  - c. Change the view of the register. See *QRG 003: Register Views* for more information.
  - d. Enter a value in the search box in the upper right and click Find.
3. Once the document has been located, click anywhere in the row to open the document.



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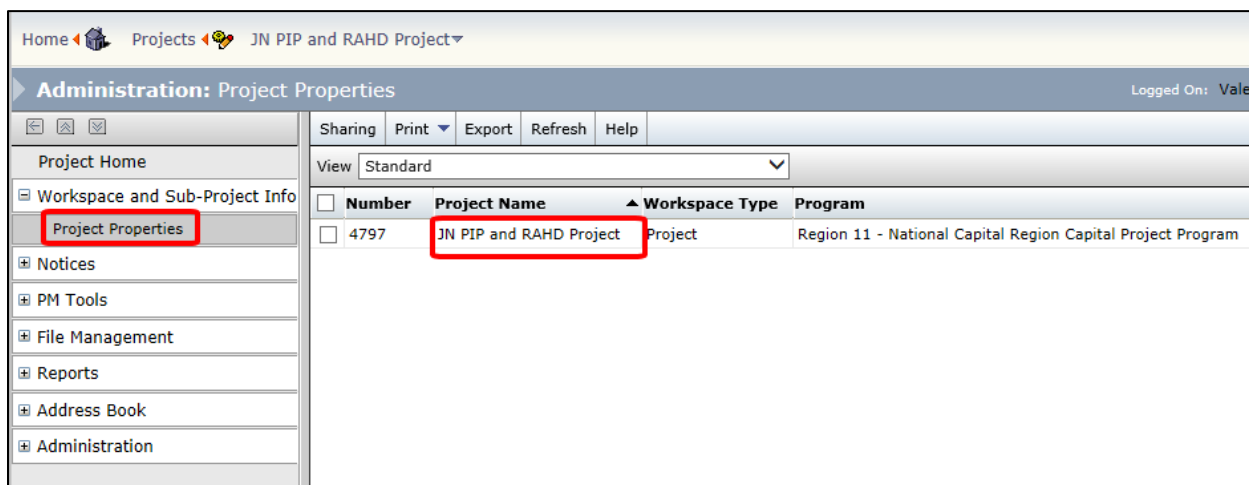
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### I. CREATE A NEW DOCUMENT

1. Click on the menu option for the type of document you want to create. (i.e. Submittals)
2. Click New in the register toolbar.
3. **Optionally**, if different types of that document are available, click the down arrow next to New in the register toolbar and select the appropriate type.

### J. EDITING PROJECT PROPERTIES

1. In the Project Workspace menu, navigate to Workspace and Sub-Project Info > Project Properties
2. Click on the only document in the register.
3. Click Edit in the toolbar.
4. Change fields as needed.
5. Click Save in the toolbar.



Home Projects JN PIP and RAHD Project

Administration: Project Properties Logged On: Valer

View Standard

Number	Project Name	Workspace Type	Program
4797	JN PIP and RAHD Project	Project	Region 11 - National Capital Region Capital Project Program

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Exit Edit Mode

Workflow

Save

Options

Forward

Sharing

Attach

General

Workflow

Activity Log

Attachments (1)

PROJECT PROPERTIES: JN PIP and RAHD Project (4797)

Cancelled

Main

Web Links

Project Manager

Periods

Languages

Properties

GENERAL \*

PROJECT DETAILS

Project Description

Project Description field: Tenant funded (RWA) renovation at Building 85, DFC, and includes

Gross SF

10000

Rentable SF

9000

Usable SF

7000

All-In Project Utilization Rate

6000

Inside Parking SF

2000

ADDITIONAL INFORMATION

Project Type

RA : Repair and Alteration

Building Type

Delivery Method

D-B-B : Design - Bid - Build

Managing Organization

11.WPIA : Office of Project Delivery

Design Plan Year

13 : FY2013

Construction Plan Year

15 : FY2015